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Microsoft Project Integration User's Guide

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Preface

The interoperation between StarTeam and Microsoft Project makes the jobs of both project planners and team members easier. Project planners use Microsoft Project to list the tasks that workers must perform. After exporting the tasks to StarTeam, they can gather information about the work accomplished by each team member using StarTeam—rather than communicating individually with each team member.

StarTeam provides the workers with access to the tasks as well as version control for the files that they work on, change management as testers find defects in those files, and so on.

Please check the Borland web site for periodic updates to both the Integration and its documentation:

<http://starteam.borland.com/starteamintegrations>

The Microsoft Project Integration works with Microsoft Project 2002 and 2003. It works with StarTeam Server 5.4 or later.

If you are a new user of this Integration, you must both install the Integration and set up Microsoft Project to use the StarTeam.mpp file. See “[Installing the Integration](#)” on page 28 and “[Setting Up the Integration in Microsoft Project](#)” on page 28.

If you are a previous user of this Integration, you must both install the Integration and upgrade your StarTeam.mpp file. See “[Removing Older Integration Macros from Microsoft Project](#)” on page 27, “[Installing the Integration](#)” on page 28, and “[Setting Up the Integration in Microsoft Project](#)” on page 28.

Contacting Borland Support

Borland Software Corporation is committed to providing world-class services in the area of consulting and technical support. We have over 15 years of experience in supporting developers and enterprise customers. Our qualified technical support engineers are prepared to handle your support needs on a case-by-case basis or in an ongoing partnership. Borland provides support worldwide, delivering timely, reliable service to ensure every customer's business success.

For more information about Borland's support services, please see our web site at <http://support.borland.com>.

From the Web site, you can also access many newsgroups where users exchange information, tips, and techniques. See <http://info.borland.com/newsgroups/> for the latest list of free product newsgroups. Also, available on the Internet is the Borland Developer Network site at <http://community.borland.com>. This Borland Community provides access to product specific information, articles, code examples, and news.

When contacting support, be prepared to provide complete information about your environment, the version of the product you are using, and a detailed description of the problem.

For support on third-party tools or documentation, contact the vendor of the tool.

Documentation Conventions

The StarTeam documentation uses the following conventions.

A vertical bar separates mutually exclusive choices in syntax.

Choose File > Exit	Indicates a menu selection followed by a submenu selection. The greater-than symbol (>) separates the commands to be selected from subsequent menus. For example, "Choose the File > Exit command" means to choose File from the menu bar and then choose Exit from the drop-down menu.
Fixed-Space Font	Text appearing in Courier font represents information that you need to type and messages from the system.
<i>italics</i>	Syntax appearing in italics represents information that you replace with the names of your files, child folders, etc. Italics are also used for the names of dialogs and books and for emphasis.
Bold	Syntax appearing in bold represents information that you must use exactly as shown (if you use it).
[]	Square brackets surround optional syntax.
	A vertical bar separates mutually exclusive choices in syntax.

Note Identifies supplemental information.

Tip Identifies information on alternative procedures or other helpful but nonessential information.

Important Identifies information that is essential to the completion of a task.

Caution Identifies actions that may result in loss of data, or procedures that must be followed to ensure that data is not lost.

Introducing the StarTeam Microsoft Project Integration

The interoperation of StarTeam and Microsoft Project make the jobs of both project planners and team members easier. Project planners use Microsoft Project to list the tasks that workers must perform. After exporting the tasks to StarTeam, they can gather information about the work accomplished by each team member via StarTeam—rather than communicating individually with each team member.

StarTeam provides the workers with access to the tasks as well as version control for the files that they work on, change management as testers find defects in those files, and so on. Workers can:

- Check their task responsibilities via StarTeam instead of using Microsoft Project itself or Microsoft Project printouts.
- Review important Microsoft Project task information such as planned start and finish dates, task dependencies on other tasks, and task notes directly from StarTeam.
- Incrementally report the work effort for tasks through StarTeam work records that can be periodically synchronized via StarTeam's Microsoft Project integration, which is a special VBA add-on for Microsoft Project.
- Link StarTeam tasks containing Microsoft Project information directly to related work products, such as files, change requests, and topics. For example, if related change requests are unresolved, the task might be considered unfinished.

Note

The term linking has more than one meaning when StarTeam and Microsoft Project interoperate. In this case, the link is a StarTeam link that connects a revision of a task with a revision of a file. You can review this type of link from StarTeam's lower pane by selecting the Link tab.

- Use StarTeam's remote access capabilities to view and report on task activities. This enables distributed team members to supply actual effort information and keep up-to-date on changes to the schedule.
- Provide additional information not available through Microsoft Project such as the StarTeam task status, project folder path, team member with overall responsibility for the task, needs attention flag, and needs attention note. With repository customization, custom fields can also be added.

Combining Microsoft Project with StarTeam

The following steps explain, in general, how team members coordinate tasks using Microsoft Project, the StarTeam Microsoft Project Integration, and StarTeam.

- 1 Project planners use Microsoft Project to list tasks.
- 2 Project planners use the Integration to export those tasks to StarTeam.
- 3 Workers review their tasks from StarTeam.
- 4 Workers perform the tasks. For example, if the task causes a worker to create or modify one or more files:
 - a The worker adds or checks in the appropriate files using the task as the process item. If appropriate, the worker can also mark the task as completed.

This step can be completed from StarTeam or from an Integrated Development Environment (IDE), such as Visual C++.
 - b The worker adds the time it takes to accomplish a task to the task in StarTeam. This is done from StarTeam and can be done during the check-in process.
 - c StarTeam automatically links the new file revisions to the current revision of the StarTeam task.
- 5 Project planners import into Microsoft Project the hours worked on tasks as recorded in StarTeam.

Note

The Task component is available only with StarTeam Enterprise.

Using This Guide

This guide explains how to install the StarTeam Microsoft Project Integration. It also explains how to:

- Use the Integration from Microsoft Project. If you are a project planner, see [“Using the Integration from Microsoft Project” on page 5](#).
- Use the tasks exported to StarTeam from Microsoft Project using the integration. If you are assigned tasks to complete from StarTeam, see [“Using StarTeam’s Task Component” on page 15](#).

Using the Integration from Microsoft Project

This chapter is for the project planner who uses Microsoft Project to export tasks to StarTeam.

Before you, the project planner, can export tasks to StarTeam from Microsoft Project, you must install both Microsoft Project and the StarTeam Microsoft Project Integration. Then you must run the macros necessary to place a StarTeam menu on the Microsoft Project menu bar. See [“Installing and Setting Up the Integration” on page 27](#).

As the project planner, you will routinely perform the following operations:

- 1 Create a new Microsoft Project (.mpp) file or open an existing one using Microsoft Project.
- 2 Determine the StarTeam Server from which you will import users and the StarTeam project, view, and folder to which you will export Microsoft Project tasks. This information usually comes from the StarTeam administrator or team leader.
- 3 Import users from StarTeam to use as resources. See [“Synchronizing Users” on page 6](#).
- 4 Add tasks to the project.
- 5 Export those tasks to StarTeam. See [“Exporting Microsoft Project Tasks to StarTeam” on page 7](#).

Tasks created in Microsoft Project can be exported to more than one StarTeam project, view, or folder. However, no individual task can be exported to more than one StarTeam location. Tasks can be re-exported to change that location.

- 6 Import work records from StarTeam to update your Microsoft Project (.mpp) file. See [“Importing StarTeam Work Records to Microsoft Project” on page 10](#).

If new users are added to StarTeam and perform work on exported tasks, those users can be imported as resources as part of the work-import process.

- 7 Synchronize the exported tasks so that the corresponding StarTeam tasks reflect any changes to the tasks in Microsoft Project. See [“Synchronizing Tasks” on page 11](#).

Tasks created in StarTeam are ignored by the Integration.

- 8 Repeat steps 4 through 7 as needed. You may need to repeat step 3 occasionally to import new StarTeam users into Microsoft Project resource sheets.

To perform these operations, you must have access to the correct servers and the correct access rights on those servers. See [“Accessing StarTeam Servers” on page 12](#) for more information.

Synchronizing Users

The StarTeam Microsoft Project Integration enables you to add StarTeam users as resources in a Microsoft Project (.mpp) file using the same names in both applications.

Because of the importance of this step, the StarTeam menu in Microsoft Project initially displays only the Sync StarTeam Users command. Do not assign resources to tasks until after importing users from StarTeam.

If you add users manually through Microsoft Project, StarTeam does not recognize them. Tasks with resources who are unknown to StarTeam end up with no resources assigned to them in StarTeam when they are exported.

Caution If square brackets appear in the StarTeam user name, Microsoft Project does not accept it as a resource.

If you manage more than one project, but staff those projects with the same resources/users, you should create a single resource pool in Microsoft Project—after you synchronize users. This enables you to:

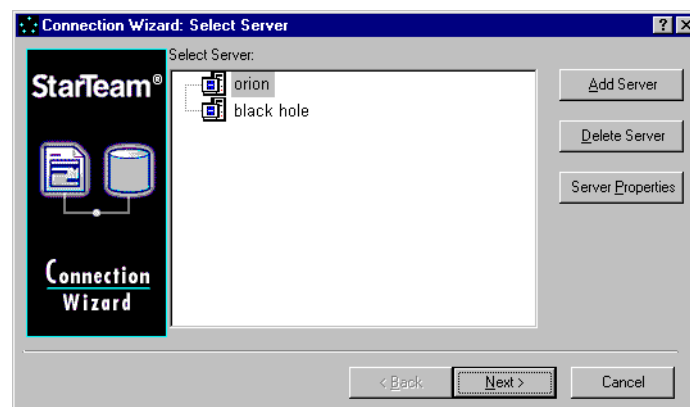
- Review resource usage and costs across projects
- Quickly add shared resources to a new project
- Identify and resolve resource over-allocation problems
- Print resource reports across projects

To synchronize users:

- 1 From Microsoft Project, open the Microsoft Project (.mpp) file to be used with StarTeam.

It is best not to use a consolidated project (one with other project files as subprojects) or a linked project (one that has links to tasks in other project files).

- 2 Choose StarTeam > Sync StarTeam Users from the *Microsoft Project* menu bar.
- 3 In the resulting *Connection Wizard: Select Server* dialog:



- a If the server you need is *not* in the list in this dialog, see [“To add a server:” on page 13](#).
- b Select a server description from the list.

- c Click Next.
- 4 In the resulting *Log On* dialog box:
 - a Enter your user name and password.
 - b Click OK.
- 5 In the resulting *Users and Resources* dialog box, which lists current StarTeam users, do one of the following:
 - Select the users from the *Users To Import* list.
 - Click Select All to include all users in the *Users To Import* list.
- 6 Click Import, and save your Microsoft Project (.mpp) file if prompted.
The selected users are added in the Existing Resources list box.
- 7 Click Close.
The users are added to your Microsoft Project resource sheet and you can assign them to Microsoft Project tasks.

To set up a pooled resource project in Microsoft Project:

- 1 After you synchronize users using StarTeam > Sync StarTeam Users, save the Microsoft Project (.mpp) file and close.
You will never have to synchronize users again, unless you:
 - Add more users
 - Change the StarTeam server address (assuming that the server description name remains the same)
 In either case, you must reopen the Microsoft Project (.mpp) file, choose StarTeam > Sync StarTeam Users, import the new users, and save the file.
- 2 When you create a new Microsoft Project, choose Tools > Resources > Share Resources.
- 3 In the resulting *Share Resources* dialog, select the Use Resources option button.
- 4 From the drop-down list box, select the resource pool file you created in step 1.

Exporting Microsoft Project Tasks to StarTeam

After you synchronize StarTeam users, you can export Microsoft Project tasks to StarTeam if you have the correct access rights in StarTeam. See [“Understanding Access Rights” on page 12](#) for more details.

After exporting tasks from Microsoft Project to StarTeam, the two tasks are said to be linked.

Note The term linking has more than one meaning when StarTeam and Microsoft Project interoperate. In this case, the link is the connection between a task in Microsoft Project and a task in StarTeam. On StarTeam’s upper pane, each task that was originally created in Microsoft Project has a blue icon. See [“Understanding the Icons” on page 17](#) for more information.

To see if a task has been exported from Microsoft Project and is still linked to StarTeam, you can add the field Text1 to Microsoft Project. This field can be used to show the Server description for each task. To do add the field, right-click the top of the upper left pane of Microsoft Project (“Task name,” on most charts) and select “Insert column. When the field drop-down list appears, scroll down to Text1 and click OK.

To keep the Microsoft Project task hierarchy consistent with StarTeam task hierarchy, you must be aware of the following restrictions:

- Each Microsoft Project task may be exported to only one StarTeam project folder at one time. If you re-export a task, it is created in the new location and deleted from the old location. Such an operation loses the StarTeam work records. However, if this data was already imported into Microsoft Project, the totals remain there and are not lost.
- You can export individual tasks or entire branches of the Microsoft Project task hierarchy. In the later case, you select the tasks that are the roots of those branches.

Note You can selectively export individual tasks from the same task hierarchy to several folders, but this is *not* recommended because the task hierarchy displayed in StarTeam will differ significantly from the one displayed in Microsoft Project.

- Most of the data that is exported from the Microsoft Project task cannot be edited from StarTeam.

For example, the Milestone and Priority check boxes are read-only for exported tasks but editable for tasks created in StarTeam. This restriction avoids problems that occur when attempting to synchronize mismatched data values and also permits the project planner using Microsoft Project to more easily make changes to the plan.

Caution You cannot export a task that has:

- A blank name
- A file attached to it as a note

To export Microsoft Project tasks to StarTeam:

- 1 Select one or more tasks to be exported from Microsoft Project.
- 2 Choose StarTeam > Export Tasks from the *Microsoft Project* menu bar.

Important If you have not synchronized users prior to exporting tasks, the server description is not displayed in the StarTeam Server text box. See ["Synchronizing Users" on page 6](#) for more information.

- 3 Review the resulting *Task Export Wizard: Currently Selected Task* dialog box. This dialog box displays the name of the first selected task and whether or not it has subtasks. It also displays the description of the StarTeam Server you are using for this project. The rest of the text boxes are not applicable at this point in time.
- 4 Click Next to display the *Task Export Wizard: Select Project* dialog box.
- 5 Select the server description.

If you are not already logged on to the StarTeam Server:

- a The *Log On to <server description name>* dialog box appears.
- b Enter your user name and password in the appropriate text boxes.
- c Click OK to return to the *Task Export Wizard: Select Project* dialog box.

- 6 Expand the server node.
- 7 Select a StarTeam project from the list, then click Next.
- 8 In the resulting *Task Export Wizard: Select View* dialog, select a view, and click Next.
- 9 In the resulting *Task Export Wizard: Select Folder* dialog box, select a folder, and click Next.

The *Task Export to StarTeam* dialog box appears.

- 10 You can export the selected Microsoft Project task, the selected Microsoft Project task and all of its children, or several of the Microsoft Project tasks in the Microsoft Project (.mpp) file. By default, the All Unexported Tasks In Plan option is selected.

Select one of the following options:

- Selected tasks only.
- Selected task and children.
- All unexported tasks in plan
- All tasks in plan (including exported tasks). Use this last option when you want to put all the tasks in new locations.

11 Click Finish.

Important

The first two options (Selected Tasks Only and Selected Task And Children) are disabled if no task is currently selected. The second option is disabled if a task is selected but has no children.

Understanding StarTeam Tasks

Within StarTeam, there are two types of StarTeam tasks: those that were created in StarTeam and those that were created in Microsoft Project. They differ in that:

- They use different icons
- They have some properties in common, but the tasks that were created in Microsoft Project have many more properties
- They have different restrictions about what fields can and cannot be edited from StarTeam

For more information, see [“Understanding the Icons” on page 17](#) and [“Reviewing or Modifying Task Properties in StarTeam” on page 20](#).

Setting the Responsibility Field

An important difference between StarTeam task properties and Microsoft Project task properties is that StarTeam tasks have a Responsibility field. If one resource has been assigned to the Microsoft Project task, the Responsibility field is set to the user name that corresponding to that resource during the export process. If more than one resource has been assigned in Microsoft Project, the Integration fills the Responsibility field with the first of those user name that it finds. (In reality, this is the user name with the lowest User ID.)

When tasks are synchronized, the Responsibility field is ignored so that changes made to this field from StarTeam are not overwritten.

Using Exported Tasks from Microsoft Project

After a task has been exported to StarTeam from Microsoft Project, avoid moving it around.

Cutting and pasting tasks in Microsoft Project is *not* recommended because cutting a task deletes it, and pasting a task creates a new task with a new ID. Even though the task looks the same, it is treated as a new task by the Integration because of the new ID.

Similarly, dragging and dropping an exported task in Microsoft may cause confusion. Suppose you have two summary tasks that have been exported to two different StarTeam folders. From Microsoft Project, if you move a task that is under one summary task so that it is under another, the task seems to disappear from StarTeam. You can find it again by selecting the root folder in StarTeam and selecting the All Descendants button. In this case, you can move the task to the new StarTeam location so that future synchronizations can be performed.

Importing StarTeam Work Records to Microsoft Project

Using the Integration from Microsoft Project, you can import the number of hours worked and the number of hours remaining from StarTeam work records. You can import information from work records for a single task, a task hierarchy (the selected task and its children) or all the tasks linked to the current Microsoft Project (.mpp) file.

If a user who is unknown to Microsoft Project works on a task in StarTeam, you are asked if that user should be added as a resource to that Microsoft Project task and the .mpp file.

If a user who is known to Microsoft Project works on a task to which he or she is not assigned, the Integration adds that user to the resources for the task in Microsoft Project.

The imported work may not show up immediately in your Microsoft Project Gantt charts because the project may need to be leveled, and so on. You can see the input from Microsoft Project as explained later in this section.

A Microsoft Project task has one cumulative work record for each resource. StarTeam may have several records for the same individual.

Important

Always import work into the Microsoft Project (.mpp) file from StarTeam tasks *before* selecting the Sync StarTeam Tasks command from the StarTeam menu in Microsoft Project. Otherwise, the work for that task in StarTeam reflects a negative adjustment of work hours equal to the previous work that was entered but not imported into Microsoft Project. The comment in the work record in StarTeam for this adjustment will read: "Adjusted for Microsoft Project plan change". This is as designed because Sync StarTeam Tasks overwrites information in StarTeam.

To import work from StarTeam tasks to Microsoft Project tasks:

- 1 Select a task from Microsoft Project to import work from.
- 2 Choose StarTeam > Import Work from the Microsoft Project menu bar.
- 3 In the resulting *Import Work Records* dialog box, select an option:
 - Selected task only
 - Selected task and children
 - All exported tasks

The first two options are disabled if no task is currently selected. The second option is disabled if a task is selected but has no children.

To see the work in Microsoft Project:

- 1 Select a task in Microsoft Project.
- 2 Choose Window > Split from the Microsoft Project menu bar.

The window splits into an upper and lower pane. The upper pane shows your tasks. The lower pane shows some data fields containing the name of the task, its duration and so on. Beneath these fields are one or more tables with column headers.

- 3 Right-click the column headers in either of the tables, and select Resource Work from the pop-up menu.

The lower pane now displays only one table, listing the task's resources and some other work-related information. The last two columns of the table are Act. Work (for actual work) and Rem. Work (for remaining work). The data in these two columns comes from StarTeam.

- 4 Update the Gantt charts. How you update these charts depends on several factors, such as how work is measured and if the project needs to be leveled.

Synchronizing Tasks

The synchronizing process updates the tasks in StarTeam by replacing the information previously exported to StarTeam with the latest information about each task from Microsoft Project.

The exceptions are the Responsibility and Status fields. During the synchronization process, these StarTeam fields are ignored to avoid overwriting changes to them made from StarTeam. Although Microsoft Project sets a task to In Progress when work is added or to Finished when all the work has been completed, StarTeam uses its own statuses. This gives project planners greater flexibility in setting a task's true status.

You should synchronize the tasks whenever you level the Microsoft Project (.mpp) file, change task dependencies, or change data fields in an exported task.

You can synchronize the task information for a single task, a task hierarchy (the selected task and its children) or all the tasks linked to the current Microsoft Project (.mpp) file.

Caution Always import work into the Microsoft Project (.mpp) file from StarTeam tasks *before* selecting the Sync StarTeam Tasks command from the StarTeam menu in Microsoft Project. For more information, see [“Importing StarTeam Work Records to Microsoft Project” on page 10](#).

Be aware that if you do not have the correct access rights to synchronize a StarTeam task at the task-level, that task becomes unlinked from its corresponding Microsoft Project task. The icon for the StarTeam task changes from blue to yellow. The task is *not* deleted.

To update StarTeam task information from Microsoft Project:

- 1 Select a task from Microsoft Project.
- 2 Choose StarTeam > Sync StarTeam Tasks from the *Microsoft Project* menu bar.

If no tasks are found in StarTeam that were created in Microsoft Project, a warning message appears.

- 3 In the resulting *Synchronize Tasks* dialog, select an option:

- Selected task only
- Selected task and children
- All exported tasks

The first two options are disabled if no task is currently selected. The second option is disabled if a task is selected but has no children.

Inevitably, all changes to the Microsoft Project (.mpp) file, whether due to resource restrictions or new requirements, result in tasks being moved or removed and new tasks being added. This makes the task hierarchy displayed in StarTeam inconsistent with the one in Microsoft Project. When you add new tasks to a part of the Microsoft Project task hierarchy that is already exported to a StarTeam project, you must select these tasks and export them and their children to a StarTeam project to use the other StarTeam integration features with these tasks.

Tip Although the Integration permits a Microsoft Project task to be exported to only one StarTeam project, you can change this export relationship at any time. To do this, re-execute the Export Tasks command using a different project, view, or folder. This replaces the original StarTeam project folder path stored in the Microsoft Project task with the new StarTeam project folder path. As part of this process, you can remove the StarTeam task and all of its children from the old project or keep it as a StarTeam task in the old project (although it no longer integrates with Microsoft Project).

Unlinking All Tasks

Sometimes you want to disconnect the StarTeam tasks from the Microsoft Project tasks and start over again. For example, you may have:

- Forgotten to import StarTeam users before exporting tasks and run into resource problems.
- Rearranged your Microsoft Project (.mpp) file so that the Microsoft Project task order no longer synchronizes with the StarTeam task order. For example, cutting a task from the middle of the Microsoft Project file's task hierarchy or changing a task's successors can cause synchronization problems.
- No longer want your Microsoft Project tasks in StarTeam.

This is referred to as “unlinking the tasks”. After the unlink operation, the icons for the tasks in StarTeam change. The tasks no longer have the blue icon that indicates that they were created in Microsoft Project. They have the yellow icon that indicates that they were created in StarTeam. These tasks are no longer linked to Microsoft Project in any way. Like tasks created in StarTeam, you can delete, move, and share them. Tasks linked to Microsoft Project cannot be deleted, moved or shared from within StarTeam. They also have several fields that cannot be edited in StarTeam.

To unlink from StarTeam all the tasks in a Microsoft Project file:

- 1 Choose StarTeam > Unlink Tasks from the *Microsoft Project* menu bar.

A *StarTeam Task Integration* dialog displays the following message:

You will unlink all the tasks in the current project. Do you want to continue?

- 2 Click Yes to continue.

Accessing StarTeam Servers

The Enterprise edition of StarTeam Server must be running with an appropriate server configuration before you can interoperate with it from Microsoft Project. Ask your administrator for the name or IP address to the computer which runs the server and the endpoint for the TCP/IP (Sockets) protocol.

Understanding Access Rights

To synchronize users and import work records, you do not need any server access rights. However, to export, synchronize or unlink tasks, you must have the ability to see, create, and modify those tasks. Access rights can be assigned to individual tasks, tasks within a specific folder, tasks within a specific view, and tasks within a specific project. They can be overridden based on group privileges or by virtue of having created the task. For details, see the *StarTeam Administrator's Guide*.

Using the Same Server Description Name

A server description is the name given to a particular StarTeam Server from StarTeam. StarTeam and Microsoft Project use these server descriptions differently. For StarTeam, each StarTeam Server description can differ from workstation to workstation because StarTeam connects to the same server based on other information: the name or address of the computer which runs the server, the protocol and endpoint used to connect to that computer. Microsoft Project does not have this capability. It relies on the server description alone. This means that, if project planners use more than one workstation to connect to the same server and access data for the

same Microsoft project, the server descriptions must be the same on each workstation. Otherwise, Microsoft Project does *not* connect properly.

Adding a Server

You can add a server only as part of synchronizing users for a new project. See [“Synchronizing Users” on page 6](#) if you are starting a new project.

The following procedure explains how to add a server for projects that have already been synchronized. In this procedure, you open a new project that you will later discard. The only purpose for the project is to add a server to the server list.

To add a server:

- 1 From Microsoft Project, open a new project file.
- 2 Choose StarTeam > Sync StarTeam Users.
- 3 In the resulting *Connection Wizard: Select Server* dialog box, click Add Server.
- 4 In the resulting *StarTeam Server* dialog box:

- a In the Server Description text box, type the server description to be used by everyone who accesses this server for this (or some specific) project.

Caution

If a project is updated from more than one workstation, each workstation must use the same server description to identify a particular StarTeam Server, or operations with Microsoft Project will fail. See [“Using the Same Server Description Name” on page 12](#) for more information about server descriptions.

- b In the Server Address text box, type the name of the computer on which the server runs or its IP address. You can browse for the name if you prefer.
- c Enter the appropriate TCP/IP endpoint.
- d Click OK to return to the *Connection Wizard: Select Server* dialog box.

Your new server description appears in the server list.

- 5 Do one of the following:
 - If your intention was only to add a server description, you are finished:
 - 1 Click Cancel.
 - 2 Close this new project without saving it. You can use this server description with other projects.
 - If you are in the process of synchronizing users, return to step 2b of the procedure named [“To synchronize users:” on page 6](#).

Understanding Fields Used by the Integration

The Integration uses a number of Microsoft Project fields. You need to be aware of the fields that are used so that you do not overwrite the data stored in them.

The Integration uses the following fields on the Gantt Chart: Text1 through Text6, Text10, and Number1 through Number4.

Table 3.1 Gantt Chart Fields Used by the Integration

Field	Contents
Text1	StarTeam Server Description
Text2	StarTeam Project Name
Text3	StarTeam View ID
Text4	StarTeam Folder Path
Text5	StarTeam View Name
Text6	StarTeam Folder Name
Text10	Microsoft Task GUID
Number1	StarTeam Object ID
Number2	StarTeam Folder Item ID
Number3	Microsoft Task Unique ID
Number4	StarTeam Task Item ID

The Integration uses the following fields on the Resource Sheet: Text1 and Number1.

Table 3.2 Resource Sheet Fields Used by the Integration

Field	Contents
Text1	StarTeam Server Description
Number1	StarTeam User ID

Troubleshooting

Problems that you see in StarTeam may have originated in Microsoft Project. For example, misinformation can be transferred during a task synchronization or export. When you see a problem with the data in a StarTeam task, check how Microsoft Project works on a task that is not part of StarTeam. It may be a Microsoft Project issue. For information about reviewing work data in Microsoft Project, see [“To see the work in Microsoft Project:” on page 10](#).

Using StarTeam's Task Component

StarTeam's Task component can interoperate with Microsoft Project or be used as a standalone. In each case, the Task component is used differently. For information about using the Task component as a standalone, see the *StarTeam User's Guide*.

Even if you are using the Task component with Microsoft Project, the *StarTeam User's Guide* provides general information about displaying tasks in the upper pane in both list and tree formats, applying task filters, using a task as a process item, and so on.

This chapter explains how to review and modify tasks in StarTeam that were originally created in Microsoft Project. In particular, it explains how to add work to such tasks.

When the Task component interoperates with Microsoft Project, that interoperation is strictly defined. The following table shows what operations should be done:

- Only by StarTeam's Task component
- Only by Microsoft Project
- By either of the two

An "X" appears in the column for StarTeam's Task component, in the column for Microsoft Project, or in both columns to indicate which applications should perform a particular operation. Whether there is an "X" in the column or not, the column can contain information you might need about the application and the specified operation.

A number of other operations can be performed on any tasks in StarTeam. See the *StarTeam User's Guide* for more information.

Important

Even if it is possible to perform an operation in StarTeam that is reserved for the Integration, it should be avoided.

(continued)

Table 4.1 Operations between StarTeam Tasks and Microsoft Project

Operation	Performed in Microsoft Project	Performed in StarTeam Task Component
Creating tasks and subtasks	X	You can add tasks while you are using StarTeam, but Microsoft Project will be unaware of them and the work for them will not be recorded in the Microsoft Project (.mpp) file.
Assigning task resources	X	X Although you can edit this field, avoid doing so. Resources you add to a task from StarTeam are overwritten when you synchronize tasks. However, if a user who is not a resource does work on the task, he or she can be added as a Microsoft Project resource for this task when you import work.
Estimating the time required to complete tasks	X	These fields are disabled in StarTeam.
Creating, editing, and deleting work records		X Work records update the percent completed and other fields in Microsoft Project.
Adding notes to a task	X	This field is disabled in StarTeam.
Filling customized task fields		X Custom fields are created via StarTeam and filled using the Custom tab of the <i>Task Properties</i> dialog.
Adding attachments		X
Adding comments for task revisions	When the Integration updates the information in a StarTeam task, a new revision is created, but no comment is added.	X
Modifying task properties	X Many StarTeam task fields are controlled solely by the Integration. See "Reviewing or Modifying Task Properties in StarTeam" on page 20.	X From StarTeam, users can modify the work records and a few other fields. See "Reviewing or Modifying Task Properties in StarTeam" on page 20.
Moving tasks	X	
Deleting tasks	X The Integration deletes tasks from StarTeam if they are children of other tasks. If the root of a task tree is deleted, the Integration cannot locate it to delete it.	X You can delete a task and its children, but only if the task is the root of a task tree and no longer linked to Microsoft Project task.

The next table lists and describes operations with the Task component used in StarTeam that have little or no effect on Microsoft Project.

Table 4.2 Operations with Little or No Effect on Microsoft Project

Operation	Effect on Microsoft Project
Displaying specific fields in the task list	No effect on Microsoft Project integration
Sorting and grouping the data in the task list	No effect on Microsoft Project integration
Applying queries or filters to the task list	No effect on Microsoft Project integration
Marking tasks or task trees read or unread	No effect on Microsoft Project integration
Searching for tasks or subtasks	No effect on Microsoft Project integration
Comparing task revisions	No effect on Microsoft Project integration
Sharing, moving, deleting tasks	You cannot move, share, or delete exported tasks.
Reconfiguring a task or subtask (rolling it back to a point in time)	No effect on Microsoft Project integration
Viewing task references	No effect on Microsoft Project integration
Adding a label to a task	No effect on Microsoft Project integration
Linking tasks to other StarTeam items	No effect on Microsoft Project integration. In this case, a link is the StarTeam link between a task and either a folder or another item in StarTeam. You can review this type of link from StarTeam's lower pane by selecting the Link tab.
Assigning access rights	No effect on Microsoft Project integration
Sending a task via e-mail	No effect on Microsoft Project integration
Creating reports and charts	No effect on Microsoft Project integration
Setting personal options for tasks	No effect on Microsoft Project integration

Understanding the Icons

Special icons identify tasks that were created in Microsoft Project. The following list shows the icons used for the tasks that were created in Microsoft Project and the tasks that were created in StarTeam.

Task that was created in Microsoft Project has been read.

Task that was created in Microsoft Project has *not* been read. Unlike topics, the red flags in the tree format do not lead you to unread items.

Subtask that was created in Microsoft Project has been read.

Subtask that was created in Microsoft Project has *not* been read. Unlike topics, the red flags in the tree format do not lead you to unread items.

Task that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has been read.

Task that was created in StarTeam (or that is no longer linked to a Microsoft Project task).

Subtask that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has been read.

Subtask that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has *not* been read.

	Task that was created in Microsoft Project has been read.
	Task that was created in Microsoft Project has <i>not</i> been read. Unlike topics, the red flags in the tree format do not lead you to unread items.
	Subtask that was created in Microsoft Project has been read.
	Subtask that was created in Microsoft Project has <i>not</i> been read. Unlike topics, the red flags in the tree format do not lead you to unread items.
	Task that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has been read.
	Task that was created in StarTeam (or that is no longer linked to a Microsoft Project task).
	Subtask that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has been read.
	Subtask that was created in StarTeam (or that is no longer linked to a Microsoft Project task) has <i>not</i> been read.

Adding Work to Tasks in StarTeam

You can add work to a task or subtask, but you cannot add work to a task that has subtasks. In Microsoft Project, a task that has subtasks is referred to as a summary task.

To add work to a task or subtask:

1 Do one of the following:

- Double-click the task. In the resulting *Task Properties* dialog, select the Work tab, and click Add.
- Select the task, and choose Task > Add Work from the menu bar.
- Select the task, and click Add Work on the toolbar.



Add
Work

The *Work Record* dialog appears.

- 2 Select the team member's name who is completing work for the task from the drop-down list box.
- 3 Enter or select the date for the work record from the drop-down calendar.
- 4 In the *Work* text box, enter the number of hours you have worked on the task.

Note When you export a task from Microsoft Project to StarTeam, StarTeam automatically calculates the remaining work if the work added is entered by a resource of this task.

Work is calculated in hours by StarTeam. Microsoft Project, by default, calculates work in days. So, you may want to change your Microsoft Project settings to display the duration field in hours to avoid discrepancies. For example, if you worked ten hours in one day, StarTeam shows that you worked 10 hours in one day. Microsoft Project would show that you worked 1.25 days.

- 1 In the *Remaining Work* text box, enter the number of hours it will take to complete the work for the task.
- 2 (Optional) Enter any notes in the *Comments* field.

To edit a work record:

- 1 Select the *Work* tab.
- 2 Select the work record from the *Work Records* list.
- 3 Click *Edit*.
- 4 In the resulting *Work Record* dialog, edit any field, and click *OK*.

To delete a work record:

- 1 Select the *Work* tab.
- 2 Select the work record from the *Work Records* list.
- 3 Click *Delete*. The message "Delete Work Record?" appears.
- 4 Click *Yes*.

The following figure shows work records that were added by StarTeam users and others that were created when the task was synchronized from Microsoft Project. The latter work records contain the comment “Adjusted for MS Project plan change.”

User	Date	Hours	Remaining ...	Comment
Jay	08/21/01	4.00	12.00	
Star	08/23/01	5.00	3.00	
Jay	08/23/01	1.00	1.50	Adjusted for MS Project plan change
Star	08/23/01	1.00	0.00	
Jay	08/23/01	1.00	0.00	Adjusted for MS Project plan change

Total actual work: 12.00

Reviewing or Modifying Task Properties in StarTeam

Tasks that are exported from Microsoft Project have two additional property tabs: Project Plan and Dependencies as shown in the following figure.

Task type: Fixed Units WBS code: 1.1

Constrain task:
Type: As Soon As Possible Date:

Project plan this task is replicated in
☒ Replicated in project plan
C:\Program Files\StarTeam\Integrations\StarTeam Microsoft Project Integration\Project1.mpp

Unique ID: 2 Last updated: 8/23/01 1:44:16 PM

You can review all and edit some of the task properties provided you have security privileges to do so. The typical user rarely does more than add work to a task, fill custom fields, add revision comments, and indicate that the task needs attention to a team leader or other team members. However, there are many properties that may be of general interest.

To review or modify a task's properties:

- Do one of the following:
 - Double-click the task in the task list or task tree.
 - Select a task, and click Properties on the toolbar.
 - Select a task, and choose Properties from the Task menu or the pop-up menu.



The properties dialog displays ten tabs. The following tables explain each of the fields on each tab and what you can and cannot edit.

Table 4.3 Task Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Subtask of	Displays the name of this task's parent. It is blank if the task is the root of a task tree.	X	
Name	Displays this task's name.	X	
Responsibility	Indicates which team member has final responsibility for this task's completion.	Initially set by the Integration to the user named as a resource who has the lowest User ID.	X
Status	Indicates where a task is in the process of completion. The values for this field are:  Pending (the default): The task is waiting on the completion or start of a predecessor task and cannot be started. This is the default for new Tasks.  Ready to Start: This task may be started because all predecessor tasks have been completed.  In Progress: This status value indicates that work has been entered for this task.  Finished: The task has been finished according to the team members working on the task.  Closed: The task has been completed to the satisfaction of the team leader or task reviewer. Depending on the policy of the team, users may be permitted to change tasks to this status value instead of using the intermediate Finished status value.  Hold: Although this task could have work performed for it based on the state of its predecessor tasks, it has been placed on hold due to other scheduling issues.	Although the Integration sets a task to In Progress when work is added or to Finished when all the work has been completed, StarTeam uses its own statuses. This gives you greater flexibility in setting a task's true status.	X
Duration	When a task has no subtasks, this indicates the length of time (in hours) that the task is expected to take. When a task has subtasks, the duration equals the amount of time from the start of the earliest subtask to the completion of the latest subtask.	X	
Milestone	Microsoft Project defines a milestone as a task of 0 length.	X	
Priority	Indicates the relative priority of the task. For Microsoft Project 98, the values are Highest, Very High, Higher, High, Medium (the default), Low, Lower, Very Low, and Lowest. For Microsoft Project 2000, 2002, and 2003, the range is 0 to 1000. In StarTeam, you see the word values rather than the number values even if you are using Microsoft Project 2000, 2002, or 2003. The Integration interprets 0–9 from Microsoft Project as Highest–Lowest.	X	
Percent complete	A measurement of what percentage of the task is completed.	X	
Needs attention	A StarTeam check box and text box that enable you to alert others that this task needs attention from others. Type information about the problem in the text box.		X

Table 4.4 Task Resources Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Task resource assignments	You can add resources and the Integration should add them to the Microsoft Project task. Removing them must be done in Microsoft Project or the integration will notice that a resource is missing and add it. If you add a resource in Microsoft Project and then synchronize the tasks, the resource is added to the task in StarTeam.	X	X Borland recommends that you not edit this field.

Table 4.5 Project Plan Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Task type	Task types are Fixed Duration, Fixed Units, and Fixed Work. See your Microsoft Project documentation for details.	X	
WBS code	A Work Breakdown Structure code as defined in your Microsoft Project documentation.	X	
Type (constraint)	Indicates how urgent a task is. The possible values are As Late As Possible, As Soon As Possible (the default), Finish No Earlier Than, Finish No Later Than, Must Finish On, Must Start On, Start No Earlier Than, and Start No Later Than.	X	
Date (constraint)	The date that accompanies any of the Type (constraint) values, with the exception of As Late As Possible and As Soon As Possible.	X	
Replicated in project plan	This check box defaults to selected and is disabled for all tasks except the task at the root of a task tree. The purpose of this check box is to enable you to delete a task tree that has been deleted from the Microsoft Project (.mpp) file. The Integration deletes subtasks for you, but does not recognize when an entire task tree has been deleted. You should clear this check box in this case or when a connection to Microsoft Project is no longer possible or desired (for example, when the .mpp file has been lost). Then you can delete these tasks if you want to.		X

Table 4.5 Project Plan Tab (continued)

Property	Description	Maintained in Microsoft Project	Editable by You
Project plan path	The complete path to the Microsoft Project (.mpp) file from which these tasks were exported.	X	
Unique ID	The unique task ID generated by Microsoft Project.	X	
Last updated	The date and time at which this task information was last updated by the Integration.	X	

Table 4.6 Time Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Start (planned)	The estimated start date for this task.	X	
Finish (planned)	The estimated start date for this task.	X	
Work (planned)	The estimated number of hours for this task.	X	
Start (actual)	The actual start date for this task.	X	
Finish (actual)	The actual finish date for this task.	X	
Work (actual)	The actual number of hours for this task.	X	
Start (variance)	The number of days between the estimated and the actual start date. When the estimated start date has passed and the task has not been started, this field displays the number of days from the estimated start date to the present date.	X	
Finish (variance)	The number of days between the estimated and the actual finish date. When the estimated finish date has passed and the task has not been finished, this field displays the number of days from the estimated finish date to the present date.	X	
Work (variance)	The difference between the number of hours allowed for the work and the number of hours done.	X	

Table 4.7 Work Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Work records	List of work records added from StarTeam or percent completion added from Microsoft Project. You can click Add, Edit, or Delete to change the list of work records. See “Adding Work to Tasks in StarTeam” on page 18 for more information.	X	X
Total actual work	Total number of hours recorded in work records. This is totaled by StarTeam from the work records.	X	

Table 4.8 Dependencies Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Predecessors	The list of tasks that must be completed before this task.	X	
Successors	The list of tasks that depend upon the current task before then can be started or completed.	X	

Table 4.9 Notes Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Notes	The contents of the Notes field in Microsoft Project.	X	

Table 4.10 Custom Tab

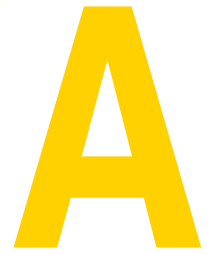
Property	Description	Maintained in Microsoft Project	Editable by You
Any number of custom fields created by your team or administrator	See the <i>StarTeam User's Guide</i> for more information.		X

Table 4.11 Attachments Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Attachments	You can add files as attachments to this task by clicking Add. You can also remove a current attachment by clicking Remove or save it to a location on your workstation using Save As. See the <i>StarTeam User's Guide</i> for more information.		X

Table 4.12 Comment Tab

Property	Description	Maintained in Microsoft Project	Editable by You
Comment for this revision	This displays the revision comment for the revision you are reviewing. Revision comments come from StarTeam team members. This field is editable from the History tab.		X
Comment for the new revision	If you have modified at least one of the other task properties, StarTeam will create a new revision of this task when you click OK. It is a good idea to explain in this text box why you made your edits, then click OK.		X



Installing and Setting Up the Integration

The StarTeam Microsoft Project Integration works with Microsoft Project 2002 and 2003. It works with StarTeam Server 5.4 or later.

If you are a new user of this Integration, you must both install the Integration and set up Microsoft Project to use the StarTeam.mpp file. See [“Installing the Integration” on page 28](#) and [“Setting Up the Integration in Microsoft Project” on page 28](#).

If you are a previous user of a much older version of this Integration, you must both install the Integration and upgrade your StarTeam.mpp file. See [“Removing Older Integration Macros from Microsoft Project” on page 27](#), [“Installing the Integration” on page 28](#), and [“Setting Up the Integration in Microsoft Project” on page 28](#).

Removing Older Integration Macros from Microsoft Project

This section explains how to remove the older Integration macros from Microsoft Project. This section is for previous users of the StarTeam Microsoft Project Integration. This must be done prior to installing the new integration.

To upgrade Microsoft Project to use the latest Integration macros:

- 1 Run Microsoft Project.
- 2 In Microsoft Project 2003, you cannot run macros until you lower the security level. To do this:
 - a Select Tools > Options > Security.
 - b Click the Macro Security button and change the security level to either Medium or Low.
 - c Click OK.
- 3 Choose File > Open, and open the StarTeam.mpp file. This file is in the folder where you installed StarTeam 5.3 (or earlier).
- 4 Choose Tools > Macro > Macros from the Microsoft Project menu bar. The *Macros* dialog appears.

- 5 Select the macro named StarTeam.mpp!Uninstall, and click Run to remove StarTeam as a menu item and remove the old Integration.
- 6 Close the StarTeam.mpp file.
- 7 In Microsoft Project 2003, return the security level to its previous setting:
 - a Select Tools > Options > Security.
 - b Click the Macro Security button and change the security level back to High.
 - c Click OK.
- 8 Delete StarTeam.mpp from your workstation. It is in the folder where you installed StarTeam (such as C:\Program Files\StarTeam xx).
- 9 Delete the StarTask.dll from your workstation. It is in the same folder as StarTeam.mpp.
- 10 Uninstall the old version of the Integration.

Installing the Integration

Download the most recent copy of the Integration from the Borland web site at:

<http://starteam.borland.com/starteamintegrations>

The file that you download is a self-extracting executable that contains both the installation files and documentation. The documentation can also be downloaded separately.

To install the StarTeam Microsoft Project Integration:

- 1 Install Microsoft Project—if it has not already been installed.
- 2 Open the file that you downloaded for the StarTeam Microsoft Project Integration.

The installation is really two installations. You will install the StarTeam Runtime as well as the StarTeam Microsoft Project Integration, unless your StarTeam Runtime is already up-to-date.
- 3 Follow the directions on your screen.

After the files are installed, the *Setup Complete* dialog appears.
- 4 If you installed the StarTeam Runtime, you must decide whether to reboot now or later. Select the appropriate option button, and click Finish.

Setting Up the Integration in Microsoft Project

This section explains how to set up Microsoft Project so that it can interoperate with StarTeam. Basically, you open the StarTeam.mpp file that comes with the Integration and run an installation macro stored in it. This places a StarTeam menu on the Microsoft Project menu bar.

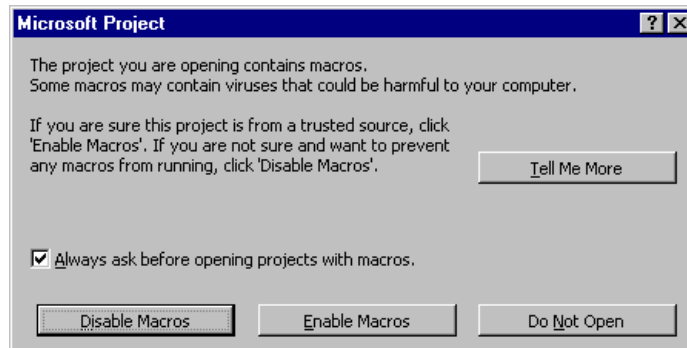
To integrate with Microsoft Project:

- 1 Run Microsoft Project.
- 2 In Microsoft Project 2003, you cannot run macros until you lower the security level. To do this:
 - a Select Tools > Options > Security.
 - b Click the Macro Security button and change the security level to either Medium or Low.
 - c Click OK.

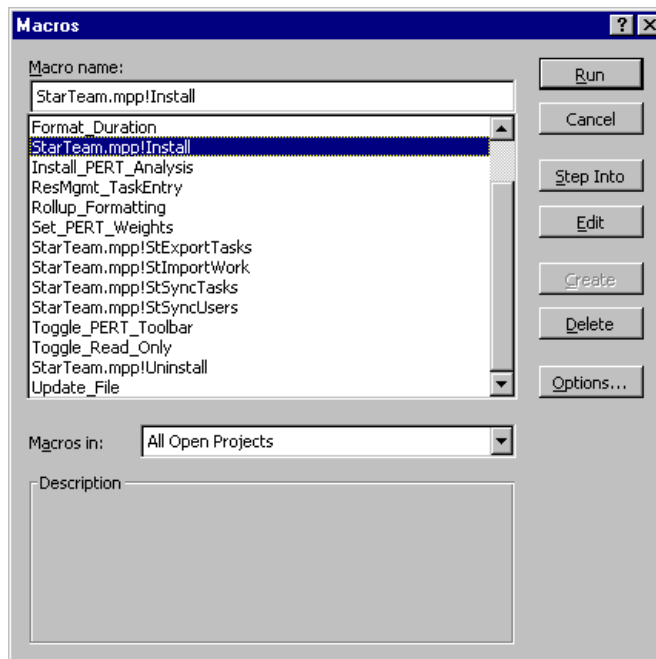
- 3 Choose File > Open from the Microsoft Project menu bar.
- 4 Locate and open the StarTeam.mpp file.

The StarTeam.mpp file is located in the folder in which you installed the StarTeam Microsoft Project Integration. This is usually C:\Program Files\StarTeam\Integrations\StarTeam Microsoft Project Integration.

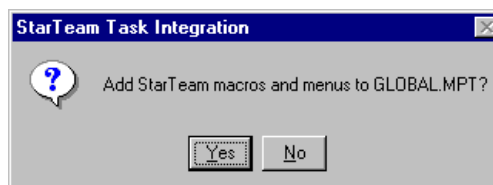
- 5 In the resulting *Microsoft Project* dialog, click Enable Macros.



- 6 Choose Tools > Macro > Macros from the Microsoft Project menu bar.
- 7 In the resulting *Macros* dialog, select StarTeam.mpp!Install from the Macros list, and click Run.

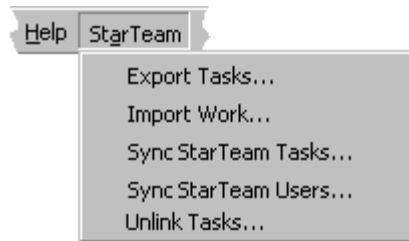


- 8 In the resulting confirmation dialog, click Yes.



The StarTeam menu is added to the Microsoft Project menu bar (after the Help menu).

The following figure shows the complete menu. Under certain circumstances you see only a partial menu. For example, initially, you see only the Sync StarTeam Users command because you must do that operation first.



- 9 Choose File > Close to close the StarTeam.mpp file. Do not save changes to this file, because it is a read-only file.
- 10 In Microsoft Project 2003, return the security level to its previous setting:
 - a Select Tools > Options > Security.
 - b Click the Macro Security button and change the security level back to High.
 - c Click OK.
- 11 Open a new or existing Microsoft Project (.mpp) file of your own. See [“Synchronizing Users” on page 6](#) to start using the Integration effectively.

Uninstalling the Integration

Uninstalling the Integration removes a few files and changes the registry keys.

To uninstall StarTeam Microsoft Integration:

- 1 Run Microsoft Project and remove the macros used by the Integration. See [“Removing Older Integration Macros from Microsoft Project” on page 27](#).
- 2 From the Windows Start menu, select Start > Programs > StarTeam > StarTeam Microsoft Project Integration > Uninstall.
- 3 Follow the directions on the screen.

Identifying the StarTeam Runtime Version

If you have trouble with the Integration, customer support may have you check the StarTeam Runtime version you are using.

To determine the StarTeam runtime version, do one of the following:

- Open the starteamxx.jar file (for example, using WinZIP). The archive now contains a text file whose name indicates the version and build information.
- Run the BuildNumber.vbs script that ships with the StarTeam. (You can double-click it from Windows Explorer.) The version information displayed comes from a java class implemented in the .jar file.

Identifying the Integration Version

- 1 Locate StarTask.dll in Windows Explorer.

The StarTask.dll file is located in the folder in which you installed the StarTeam Microsoft Project Integration. This is usually C:\Program Files\StarTeam\Integrations\StarTeam Microsoft Project Integration.

- 2 Right-click the file name and choose Properties from the pop-up menu.
- 3 Select the Version tab. The file version on this tab is the version of the Integration.

Understanding the Files

Several files are installed as part of this Integration. You may need to be aware of some of them.

The name of the Integration executable is StarTask.dll. StarTask.log records runtime errors from StarTask.dll.

User.pdf is the online manual that you can access from the Start menu. StarTask.hlp and StarTask.cnt provide Microsoft help. When you use the commands on the StarTeam menu inside Microsoft Project, each dialog has a Help button that accesses this help.

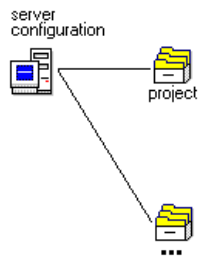
StarTeam.mpp is a Microsoft Project file. It contains several macros that support the Integration. For example, it contains the macros that add the StarTeam menu to and remove it from Microsoft Project's menu bar.

Understanding StarTeam and Its Terminology

An instance of StarTeam Server controls the storage of your files. Each StarTeam Server instance runs a server configuration. The following figures provides an overview of the project structure controlled by an instance of StarTeam Server.

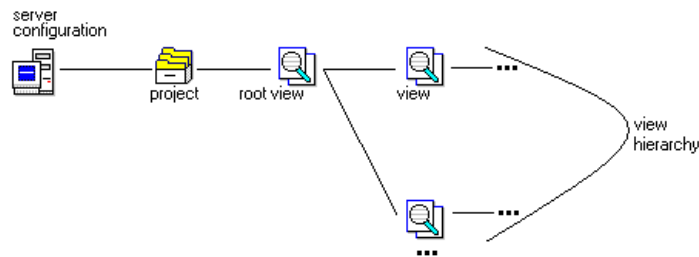
Servers and Projects

The server/server configuration can manage any number of StarTeam projects. A project is a way to group your files according to the purpose they serve. For example, a project may be for all the files related to a software application created by your company or all the files related to a component of that software application.



Views

Each project has one root view and any number of child views.

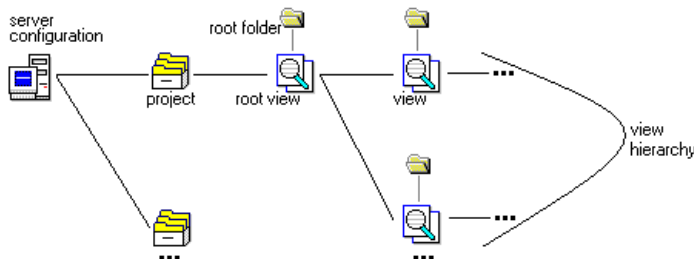


Your StarTeam administrator will use views to:

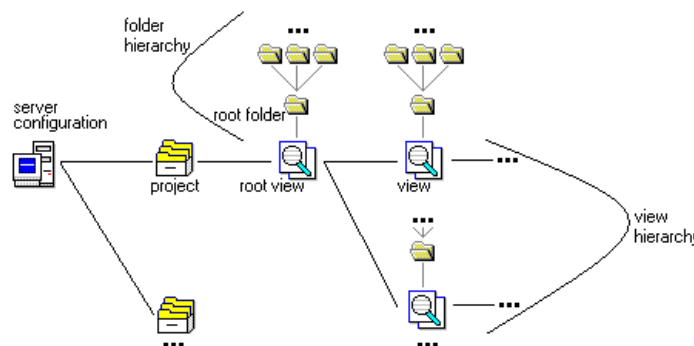
- Provide access to only a subset of the files in a project. For example, a developer may not need to be aware of files stored in that project for marketing purposes and a market researcher might not need to be aware of the source code files. They can both work on the same project, but in different views, each of which is a subset of a the root view. Such views are called reference views.
- Provide a branch for the project. For example, suppose the root (or main) view of a project stores source code for Release 1.0 of a software application. After the application is released, suppose that work on Release 2.0 continues in the root view. An additional view might be necessary for a maintenance release, such as Release 1.0 Service Pack 1. Branching views enable you to work on files with the same names, despite the fact that they contain different code, because they reside in different views. StarTeam enables you to merge such files when you need to.

StarTeam Folders

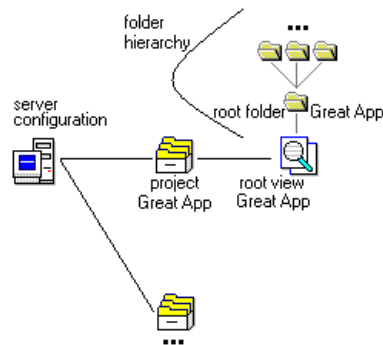
The root view and every child view has one StarTeam folder as its root folder.



A root folder can have any hierarchy of child folders. This is called the StarTeam folder hierarchy.



When you create a StarTeam project, its root view, and the root view's root folder are created automatically and given the same name as the project. For example, if the project's name is Great App, the root view's name is initially Great App, and the root folder's name is initially Great App. You can change any of these names using StarTeam (if you have the correct access rights).



Server Descriptions

Before you can use an instance of StarTeam Server, you must create a server description that identifies that instance. The server description can have a name of your choosing, but it must identify the computer on which the instance is running and the endpoint used by the TCP/IP protocol to access the instance's server configuration.

If your workstation has both StarTeam and an integration, both applications must use the same server description for the same instance of the server. After the server description is defined by either application, both can use it.

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